



# Case Management Information System “CMIS”

Section 1: Employment Outcomes Instructions — pages 2 - 10

Section 2: Planned Rates Instructions — pages 11 - 17

**Division of Developmental Disabilities**  
**5/1/2009**

# CMIS: Employment Outcomes & Planned Rates

## Section: Employment Outcomes process

1. Find the “Data Transfer” tab and then choose “Employment Output” on the left of the screen. Your screen should look similar to below.

https://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:TabbedHeader:mainL - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address [https://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:TabbedHeader:mainLayoutPanel:tabbedHeader:tbDataTransfer\\_submittedLink=form1:TabbedHeader:mainLayoutPanel:tabbedHeader:tbDataTi](https://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:TabbedHeader:mainLayoutPanel:tabbedHeader:tbDataTransfer_submittedLink=form1:TabbedHeader:mainLayoutPanel:tabbedHeader:tbDataTi) Go Links >>

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**AWA** COUNTY

Work List Client Billing Providers **Data Transfer** Reports

Employment Output  
Employment Input  
Billing Output  
Billing Input

**Employment Output**

Start Date:\* End Date:\*

Service Type:

Provider:

Generate

Internet

# CMIS: Employment Outcomes & Planned Rates

2. Enter the “Start date” and “End date” for the range of authorized clients you would like to see and/or update employment information on. A pop up calendar should appear when you click once in the appropriate “Start...” or “End...” box. Select the dates you want with a click (note: if you have chosen the wrong date just click and the pop up calendar will appear for you to choose the correct date. If you prefer not to use the pop up calendar just start to enter the date in yyymm format. Both the “Start date” and “End date” are required data fields.

The screenshot shows a web browser window displaying the AWA County Worklist application. The browser's address bar shows the URL: `http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:TabbedHeader:mainLa`. The application header includes a welcome message for Branda Matson in Thurston and links for County Resources, Help, and Logout. A navigation bar contains tabs for Work List, Client, Billing, Providers, Data Transfer, and Reports. The main content area is titled "Employment Output" and features a sidebar with links for Employment Output, Employment Input, Billing Output, and Billing Input. The "Employment Output" section contains two date input fields, "Start Date:" and "End Date:", each with a calendar icon. A calendar pop-up is displayed for the year 2009, showing months from January to December. The status bar at the bottom indicates "Done" and "Internet".

# CMIS: Employment Outcomes & Planned Rates

3. Choose the "Service type" from the drop down or do not choose a type and receive all service types: Individual Employment, Group Supported Employment, and Person to Person.
4. If you have chosen one "Service type" then you may choose a "Provider". If you do not choose one Provider you will receive all providers for the chosen service type.
5. Click on the "Generate" button and open or save the file.
6. Most often you will choose to save the file.

http://147.56.204.185/awa/faces/county/datatransfer/view/EmploymentOutputView.jsp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://147.56.204.185/awa/faces/county/datatransfer/view/EmploymentOutputView.jsp Go Links >>

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**AWA** COUNTY

Work List Client Billing Providers **Data Transfer** Reports

**Employment Output**

Employment Output  
Employment Input  
Billing Output  
Billing Input

**Start Date:** 200901 **End Date:** 200903

**Service Type:** Individual Employment

**Provider:**

- CAREER QUEST, LLP/THURSTON
- CREATIVE EMPLOYMENT MORNINGSIDE
- EMPLOYMENT SOLUTIONS PLUS
- ENDEAVOR RESOURCES/THURSTON CO.
- EXCEPTIONAL FORESTERS/THURSTON
- MORNINGSIDE/THURSTON
- ST. MIKE'S TIKES
- THURSTON CO SOCIAL SVCS
- (\*)CENTERFORCE
- (\*)EASTER SEAL SOC OF WA

Done Internet

# CMIS: Employment Outcomes & Planned Rates

7. An output file that contains the following information should appear.
8. Complete items six (6) thru thirteen (13).
9. Save completed file on your computer.
10. Next step is to “Input” or upload the file onto the CMIS.

|    | Name                                | Values  |
|----|-------------------------------------|---|
| 1  | Client County                       | Logged on County – <i>pre-filled</i>                          |
| 2  | Provider                            | From Open Authorization– <i>pre-filled</i>                    |
| 3  | ADSA ID                             | From Open Authorization– <i>pre-filled</i>                    |
| 4  | Client Last Name                    | From Client Demographics– <i>pre-filled</i>                   |
| 5  | Client First Name                   | From Client Demographics– <i>pre-filled</i>                   |
| 6  | Employer Name                       | Text – 64 characters possible                                 |
| 7  | Job Type                            | Code – 4 digits (see list on next page)                       |
| 8  | Start Date                          | Date MM/DD/YYYY   |
| 9  | End Date                            | Date MM/DD/YYYY   |
| 10 | Medical Insurance                   | Blank, Y or N   |
| 11 | Dental Insurance                    | Blank, Y or N   |
| 12 | Paid Leave                          | Blank, Y or N   |
| 13 | Retirement                          | Blank, Y or N   |
| 14 | Last Employment Outcome Update Date | From Last Employment Outcome Update Date on the CMIS database |

# CMIS: Employment Outcomes & Planned Rates

Job Type – 4 digit code:

| Code | Description   |
|------|---|
| JT01 | Clerical  |
| JT02 | Labor   |
| JT03 | Management  |
| JT04 | Professional  |
| JT05 | Service   |
| JT08 | Administrative Support Occupations                      |
| JT09 | Animal Husbandry, Agriculture and Related Occupations   |
| JT10 | Education Occupations                                   |
| JT11 | Food Services Occupations                               |
| JT12 | Lodging, Building and Related Occupations               |
| JT13 | Machine Trade Occupations                               |
| JT14 | Manufacturing, Construction and Related Occupations     |
| JT15 | Medical/Health Care Occupations                         |
| JT16 | Personal Service Occupations                            |
| JT17 | Physical Sciences and Laboratory Technology Occupations |
| JT18 | Professional and Support Specialists                    |
| JT19 | Social Service Occupations                              |
| JT20 | Wholesale/Retail Trade Occupations                      |
| JT21 | Other Occupations                                       |

# CMIS: Employment Outcomes & Planned Rates

11. Choose the "Employment Input" tab.
12. File:  Browse appears click on browse and find the file name you previously saved – click on it.
13. File name should appear in the box after File:
14. Hit Upload and the input results and errors will appear (note this is an identical process to the monthly billing).

http://147.56.204.185/awa/faces/county/datatransfer/view/EmploymentOutputView.jsp?form1:DataTra - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address http://147.56.204.185/awa/faces/county/datatransfer/view/EmploymentOutputView.jsp?form1:DataTransferNavigation:hlEmploymentInput1\_submittedLink=form1:DataTransferNavigation:hlEmploymentInput1 Go Links

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**AWA** COUNTY

Work List Client Billing Providers Data Transfer Reports

Employment Output  
Employment Input  
Billing Output  
Billing Input

**Employment Input**

File:  Browse...

Upload

**Employment Input Results**

|                            |                        |                          |
|----------------------------|------------------------|--------------------------|
| Records uploaded: 0        | Records with errors: 0 | Records with warnings: 0 |
| Total records processed: 0 |                        |                          |

**Upload Errors**

| Description |
|-------------|
|-------------|

# CMIS: Employment Outcomes & Planned Rates

15. Click on the client tab. Search for a client. Find the “Employment Outcome” on the left of the screen.
16. Uploaded employment outcome information will appear on the “Employment Outcome” tab bottom half of screen.
17. Available SSA / DVR information will appear on the top half of the screen.

The screenshot shows a web browser window displaying the AWA County CMIS application. The address bar shows the URL: [http://147.56.204.185/awa/faces/county/client/view/EmploymentOutcomeView.jsp?form1:ClientNavigation:hlEmploymentOutcome2\\_submittedLink=form1:ClientNavigation:hlEmploymentOutcome2](http://147.56.204.185/awa/faces/county/client/view/EmploymentOutcomeView.jsp?form1:ClientNavigation:hlEmploymentOutcome2_submittedLink=form1:ClientNavigation:hlEmploymentOutcome2). The page title is "Welcome, Branda Matson | Thurston". The navigation menu includes "Work List", "Client", "Billing", "Providers", "Data Transfer", and "Reports". The "Client" tab is selected, and the "Employment Outcome" link is highlighted in the left sidebar. The main content area is divided into two sections: "SSA / DVR" and "Employment Outcome List".

**SSA / DVR**

|                |                       |                      |                      |                  |
|----------------|-----------------------|----------------------|----------------------|------------------|
| PASS:          | IRWE:                 | Subsidy:             | DVR Status:          | DVR Status Date: |
| DVR Counselor: | DVR Counselor Office: | DVR Counselor Email: | DVR Counselor Phone: |                  |

**Employment Outcome List**

| Employer Name | Job Type                  | Start Date | End Date |
|---------------|---------------------------|------------|----------|
| Safeway       | Food Services Occupations | 09/29/2008 |          |



# CMIS: Employment Outcomes & Planned Rates

18. An “Add Employment” button allows for an instant update – an option to uploading many client records.

The screenshot displays the AWA County CMIS web application in Microsoft Internet Explorer. The browser's address bar shows the URL: `http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:Client`. The page header includes a welcome message for Branda Matson and navigation links for County Resources, Help, and Logout. The main navigation menu includes Work List, Client, Billing, Providers, Data Transfer, and Reports. The left sidebar lists various client information sections, with 'Employment Outcome' selected. The main content area shows the 'Employment Outcome List' with a table header including 'Employer Name'. An 'Employment Outcome Dialog' is open, featuring fields for 'Employer's Name\*', 'Job Type\*', 'Start Date\*', and 'End Date\*'. Below these fields is a section for 'Employment Benefits' with checkboxes for Medical Insurance, Paid Leave, Dental Insurance, and Retirement. At the bottom of the dialog are buttons for Delete, Save, and Cancel.

http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:Client - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address `http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:ClientNavigation:hlEmploymentOutcome_submittedLink=form1:ClientNavigation:hlEmploymentOutcome` Go Links >>

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AWA COUNTY

Work List Client Billing Providers Data Transfer Reports

Client Search > Employment Outcome

Demographics Overview Client Contact Residence History Collateral Contact County Service Referral County Service Auth Employment Outcome

SSA / DVR

PASS: IRWE: Subsidy: DVR Status: DVR Status Date:

DVR Counselor: DV

Employment Outcome List

Employer Name

Employment Outcome Dialog

Employer's Name:\*

Job Type:\* Start Date:\* End Date:

Employment Benefits

☐ Medical Insurance ☐ Paid Leave ☐ Dental Insurance ☐ Retirement

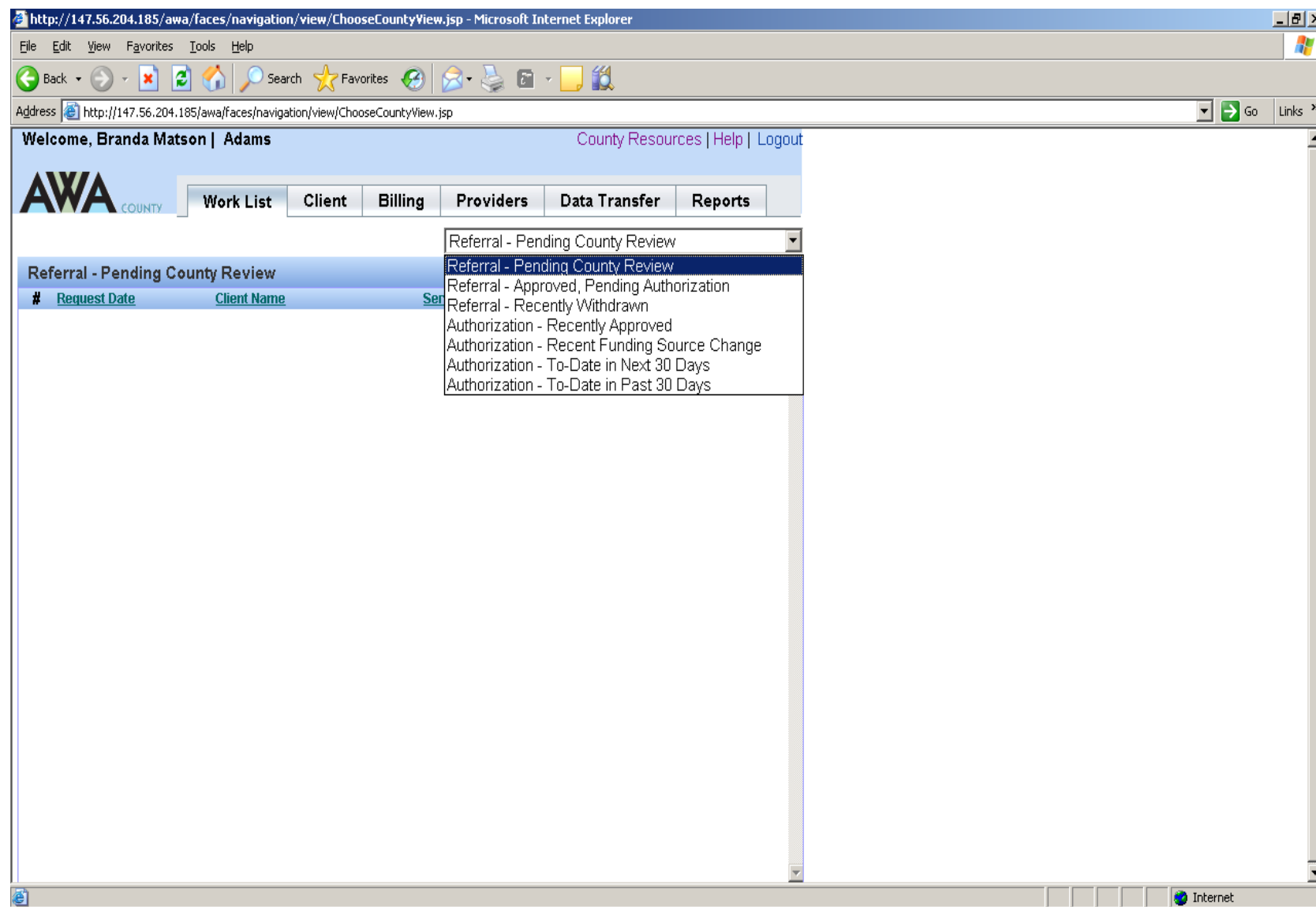
Delete Save Cancel

Done Internet

# CMIS: Employment Outcomes & Planned Rates

## Section II: Planned Rates process

1. The “Referral” information has been modified to capture Minimums and Maximums for rates and service hours/month.



# CMIS: Employment Outcomes & Planned Rates

2. The Rate / Unit has been expanded to include a Minimum and Maximum Rate / Unit.
3. The Rate / Unit needs to correlate to the Unit Type.
4. The # of Units / Month has been modified to include minimums and maximums but is now referred to as Service Hrs / Mo.
5. The “Minimum & Maximum Service Hrs / Mo.” translates to the range of service hours a client can expect to receive from their service provider per month.

http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpReferral:1:ClientName\_submittedLink=form1:dpReferral:1:ClientName

Client Information

Client Name: County of Residence: County of Contract: Thurston

Service Type: Individual Employment Provider: CAREER QUEST, LLP/THURSTON

Funding Source: State Only Client Tentative Start Date: 04/01/2009

Resident County Response

County: Thurston Response:

Comments:

Service County Response

County: Thurston Response:

Service Type: Individual Employment Planned Start Date: Unit Type:

Provider:

Min Rate / Unit: Max Rate / Unit: Min Units / Month: Max Units / Month:

Comments:

Processing Status: Pending County Response Authorization Exists

6. All other referral information remains the same:
  - ▶ Indicate Planned Start date (date cannot be sooner than the case manager's tentative start date)
  - ▶ Unit billing type (Hour, Day, Month)
  - ▶ Confirm Provider “or” reject and offer a comment for the case manager
  - ▶ Complete minimum and maximum unit rate that correlates to the unit type
  - ▶ Complete minimum and maximum service hours / month (range of service hours client can expect from provider)
  - ▶ Comment(s) if necessary
  - ▶ Change Processing status to Finalized

# CMIS: Employment Outcomes & Planned Rates

7. From the finalized referral the Case manager issues the CSA.

http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpAuthorization:6:lAuthNumber\_submittedLink=form1:dpAuthorization:6:lAuthNumber

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Address http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpAuthorization:6:lAuthNumber\_submittedLink=form1:dpAuthorization:6:lAuthNumber Go Links >>

Client Search > Client Service Auth

County Service Authorization Planned Rate

**Client Service Auth**

**Service Type:**  
Individual Employment

**Provider Name:** EMPLOYMENT SOLUTIONS PLUS **Provider Number:** P207146

**Address:**  
1113 Sleater Kinney RD SE

**City:** Olympia **State:** WA **Zip:** 98503

**Authorization Period**

**From Date:** 03/01/2009 **To Date:** 06/30/2009

**Funding**

| Source | Start Date |
|--------|------------|
| CP     | 03/01/2009 |

**Status**

Open

Print Cancel

Done Internet

# CMIS: Employment Outcomes & Planned Rates

8. The Planned Rates and Service Hour Range are populated from the finalized referral now part of the CSA - second tab.

The screenshot shows a web application interface for AWA County. The browser window title is "http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:tabSet - Microsoft Internet Explorer". The address bar shows the URL "http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:tabSet1:tab2\_submittedLink=form1:tabSet1:tab2". The page header includes a welcome message "Welcome, Branda Matson | Thurston" and links for "County Resources | Help | Logout". The main navigation bar has tabs for "Work List", "Client", "Billing", "Providers", "Data Transfer", and "Reports". The "Client" tab is selected, and the "County Service Auth" sub-tab is active. The left sidebar lists navigation options: "Demographics", "Overview", "Client Contact", "Residence History", "Collateral Contact", "County Service Referral", "County Service Auth" (highlighted), and "Employment Outcome". The main content area displays the "County Service Authorization" and "Planned Rate" tabs. The "Planned Rate" tab is active, showing a table with the following data:

| Unit Rate  | Start Date | Unit Type | Min Units/Month | Max Units/Month | Min Unit Rate | Max Unit Rate |
|------------|------------|-----------|-----------------|-----------------|---------------|---------------|
| 04/01/2009 |            | Hour      | 15.00           | 15.10           | 15.0000       | 15.0500       |

There is an "Add Planned Rate" link above the table. The browser's status bar at the bottom shows "Done" and "Internet".

# CMIS: Employment Outcomes & Planned Rates

9. Counties will use this screen to update changes such as the amount of provider service hours and/or changes to the unit rate or unit type. Case managers receive a tickler when changes are made.

The screenshot shows a web browser window with the URL `http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:tabSet`. The page is titled "Welcome, Branda Matson | Thurston" and includes a navigation bar with tabs: Work List, Client, Billing, Providers, Data Transfer, and Reports. The main content area is titled "County Service Authorization" and has a sub-tab "Planned Rate". A table displays the current planned rates:

| Unit Rate Start Date | Unit Type | Min Units/Month | Max Units/Month | Min Unit Rate | Max Unit Rate |
|----------------------|-----------|-----------------|-----------------|---------------|---------------|
| 04/01/2009           | Hour      | 15.00           | 15.10           | 15.0000       | 15.0500       |

An "Add Planned Rate" link is visible above the table. A modal dialog titled "Planned Rate Dialog" is open, allowing users to add a new rate. The dialog contains the following fields:

- Unit Type:\*
- Min Rate/Unit:\*
- Max Rate/Unit:\*
- Min Units/Month:\*
- Max Units/Month:\*
- Unit Rate Start Date:\*

The dialog also includes "Delete", "Save", and "Cancel" buttons.

# CMIS: Employment Outcomes & Planned Rates

For additional information you have a couple of options:

- ▶ The County Resource found on your web page will take you to the CMIS Project Intranet where you will find material related to the County CMIS project including billing instruction, business requirements, sample output files, etc.
- ▶ The Help link also on your web page provides you with instant information related to the screen you are on.
- ▶ You can always call the ADSA Help desk
  - In the Olympia Area: 725-2460
  - Statewide: 1-800-818-4024 or
  - E-mail [ADSAHelpDesk@dshs.wa.gov](mailto:ADSAHelpDesk@dshs.wa.gov)

http://adsawebaccess.dshs.wa.gov/awa/faces/county/client/view/CountyServiceReferralDetailView.jsp?form1:clientSearchBreadcrumbTrail:hyperlink1\_submittedLink=form1:clientSearchBreadcrumbTrail:hyperlink1

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Address http://adsawebaccess.dshs.wa.gov/awa/faces/county/client/view/CountyServiceReferralDetailView.jsp?form1:clientSearchBreadcrumbTrail:hyperlink1\_submittedLink=form1:clientSearchBreadcrumbTrail:hyperlink1 Go Links

**AWA** COUNTY

Welcome, Branda Matson Wahkiakum Logout

Work List Client Billing Providers Reports

County Resources Help

**Client Search**

Last Name: First Name: Birth Year: SSN: ADSA Id: Search

| # | Last Name | First Name | Birth Date | SSN | ADSA Id | Status |
|---|-----------|------------|------------|-----|---------|--------|
|---|-----------|------------|------------|-----|---------|--------|

http://adsawebaccess.dshs.wa.gov/awa/faces/county/client/view/CountyServiceReferralDetailView.jsp?form1:clientSearchBreadcrumbT Local intranet